

PUBLIC INFORMATION & COMMUNICATION SERVICES (PICS)
NIH—TASK ORDER

RFTOP#

TITLE: Evaluation/Management Support for Trans-NIH ACSI Online Survey Project

PART I—REQUEST FOR TASK ORDER (TO) PROPOSALS

A. Point of Contact Name:

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Office of Financial Management
National Institutes of Health
Bldg., 31, Room B1B39
Bethesda, MD 20892-2045

B. PROPOSED PERIOD OF PERFORMANCE:

Sixteen (16) months from date of award.

C. PRICING METHOD:

Firm Fixed Price, not to exceed \$187,000.

D. PROPOSAL INSTRUCTIONS:

Technical proposal should not exceed ten (10) pages in length, and budget proposal with pricing/cost should not exceed four (4) pages in length = total proposal length not to exceed fourteen (14) pages, exclusive of resumes of proposed key personnel and not to exceed two (2) writing and/or work samples. Proposals should be submitted electronically as a Word attachment to an e-mail.

Resumes of key proposed personnel, as well as up to two (2) writing and/or work samples, should be submitted as Word attachments and/or hot linked web sites (with URLs specified). Offerors must also submit a completed task order form (see last page of this RFTOP) with their proposals.

E. RESPONSE DUE DATE:

Proposals are due via e-mail by 5:00 PM, EDT, Monday, September 13, 2004. E-mail all proposals to Fred Wood, Project Officer, fredwood@mail.nih.gov, and please enter into the subject line of your email “RFTOP# <insert #>-- Proposal from <insert name of your firm>”.

F. TASK DESCRIPTION: Follows below, after evaluation factors.

G. EVALUATION FACTORS:

- Offeror’s general experience and qualifications regarding web evaluation and analysis and project management—offerors are required to submit resumes of key personnel (as Word attachments and/or hot-linked URLs) .
- Offeror’s specific experience and qualifications regarding customer satisfaction surveys, including online web user surveys—experience with the American Customer Satisfaction Index (ACSI) survey methodology a plus.
- Offeror’s specific experience and qualifications regarding management of complex web evaluation (or similar) projects with multiple participants, working relationships, and information flows.
- Offeror’s prior demonstrable record of quality report writing—offerors are encouraged to submit up to two (2) illustrative relevant reports or other work products (in electronic format, as a Word attachment and/or hot-linked URL).
- Physical proximity of offeror’s personnel to the NIH campus and/or availability to participate in the required meetings.
- Offeror’s overall labor cost rate(s) and travel costs for the required activities.
- Offeror’s ability to provide the required support and services within the stated budget ceiling.

Please note that because this is a Firm Fixed Price contract with a stated budget ceiling, technical factors including relevant expertise, experience, and demonstrable quality of work will be given the greatest weight in evaluating proposals, followed by availability to participate in activities at the NIH campus in Bethesda, MD. The labor cost rates and travel costs will be a lesser although still significant factor in determining the offeror’s ability to provide the required support and services within the stated budget ceiling.

TASK DESCRIPTION

Background Information

The National Institutes of Health (NIH), like other government agencies, has transitioned its information dissemination activities to a largely web-based environment. Accordingly, evaluation of NIH web sites has taken on greater importance, and also is consistent with departmental and government wide emphases on E-Government and customer satisfaction feedback as part of the web development and management process.

In this context, NIH is implementing a trans-NIH project focusing on the use of the American Customer Satisfaction Index (ACSI) online customer satisfaction survey by approximately 60 NIH web sites spanning about 28 different NIH units and offices. The survey implementation will be phased in over approximately six months. The ACSI survey includes a set of standardized questions that are the same across platforms, thus allowing comparability across web sites and over time. The ACSI survey also offers clients the option of adding custom questions, including multiple choice and open-ended questions. NIH intends to contract with the Federal Consulting Group/U.S. Department of the Treasury for the services of ForeseeResults Inc. for implementation of the ACSI survey itself, including assistance to NIH on the development of custom questions, collection and reporting of survey results on a periodic basis, analysis and interpretation of survey results, and briefings to NIH client units on the survey results and implications.

The NIH project is being managed by an NIH ACSI Survey Leadership Team, with assistance from an Evaluation Consultant and Management Consultant with regard to project evaluation and management activities, respectively. These consultant services are the focus on this solicitation.

About the ACSI

For full information on the ACSI, see www.theacsi.org and www.foreseeresults.com. A synopsis is provided below.

The ACSI methodology provides continuous (monthly) online customer satisfaction feedback and is a uniform, national measure of customer satisfaction and has been used as a benchmark for companies, industries, and select major Federal Government agencies since 1994. The core set of ACSI questions measures overall customer satisfaction, and the ACSI survey also provides the flexibility to include custom questions geared to each individual client web site. Federal use of the ACSI methodology is coordinated through the Federal Consulting Group, a franchise within the U.S. Department of the Treasury. A contractor, ForeseeResults, Inc, provides the actual services. Survey instruments are approved under OMB expedited clearance procedures.

The ACSI statistical models provide customer satisfaction indices (on 0 to 100 scales) and indices of antecedents (drivers or causes) and consequences (outcomes) of satisfaction with the products and services of specific companies, industries, and government agencies.

The key variables associated with the ACSI surveys include:

- Web site variables (e.g., content, design and functionality, site performance)

- User demographics (e.g., age, education, race/ethnicity, geography)
- User motivation (e.g., how learned of site, why visiting site, frequency of visits)
- User impacts (e.g., use of information from site, level of satisfaction, likelihood to return to site, likelihood to recommend site to others)

In the NIH context, the ACSI survey collects new data from site visitors via an online “pop-up” web survey, allowing users to answer a series of questions regarding their experience with the web site. A randomized “pop-up” online user survey provides results with higher statistical validity than a self-selected “bounce back” survey where anyone can respond; the online survey capability allows the efficient surveying of large numbers of users in relatively short periods of time. The sampling rate is primarily determined by the level of web usage and the response rate. Response rates typically range from 3 percent to 7 percent, averaging about 5 percent overall. The sampling rate is usually set to produce about 300 completed surveys per reporting period (five to six weeks) for overall satisfaction questions, and 100 completes for other questions on elements of satisfaction.

Collection, preparation, and primary analysis of the ACSI data are the responsibility of ForeseeResults, Inc. Primary data on survey response rates and the actual survey responses are provided by ForeseeResults, Inc. via a password-protected client web site. ForeseeResults Inc. also provides various analytical and summary reports about every six weeks, and also periodic client briefings on interpretation and application of survey results.

The survey results are intended to allow web managers to, for example:

- Determine the impact of website changes on customer satisfaction and their loyalty to the survey web sites.
- Respond more quickly and effectively to customers' changing demands, impacted by the ever-evolving web environment.
- Benchmark satisfaction of NIH web sites against satisfaction levels of web sites from other agencies, companies, or industries.
- Better understand user needs for, in this context, health information and user motivations for seeking and using such information.
- Allocate resources to maximize return on investment in web sites and related information dissemination programs.

About the Project Evaluation and Management

The evaluation-related aspects of the project include:

Primarily ForeseeResults Inc. Responsibility

- Web site-specific ACSI survey results for each participating NIH unit, provided by ForeseeResults, Inc.—data are collected continuously and reported every five to six weeks;

- Web site-specific analytical and summary reports, based on the ACSI survey results, for each participating NIH web site, provided by ForeseeResults, Inc.—approximately every six weeks;
- Teleconference debriefing by ForeseeResults, Inc. on survey results and analysis with each participating IC—approximately every six weeks (Note: participating NIH staff also will have the opportunity to attend and participate in government-wide quarterly briefings held by ForeseeResults, Inc.);
- NIH-wide in person debriefing by ForeseeResults, Inc. and discussion of survey results and analysis and implications, open to participating NIH units and any others at NIH who are interested—biannually;

Primarily Evaluation Consultant Responsibility

- Mid-course process evaluation and preliminary outcomes evaluation report, to be prepared by the Evaluation Consultant in collaboration with the NIH ACSI Survey Leadership Team and input from participating NIH units;
- Final process and outcomes evaluation report, to be prepared by the Evaluation Consultant in collaboration with the NIH ACSI Survey Leadership Team and with input from the participating NIH units—to include evaluation of trans-NIH collaborative aspects of the project and opportunities for further collaboration in this or related aspects of web evaluation, such as trans-NIH options for prototype custom questions, survey instrument design and timing, and survey results analytics, presentation, and reporting;

NIH ACSI Leadership Team Responsibility

- Informal discussion of ACSI work in progress and interim results at NIH Web Authors Group (WAG) meetings open to participating NIH staff and any others interested—bimonthly or as needed;
- NIH-wide staff workshop on the results of the trans-NIH ACSI project, web evaluation, and improving the NIH web presence, to be organized by the NIH ACSI Survey Leadership Team with WAG and participating IC involvement, and with input and participation of the Evaluation Consultant and ForeseeResults/FCG;
- Cross-integration, synthesis, and vetting of all trans-NIH evaluation work;
- Preparation of a publishable paper on the project, prepared by the NIH co-principal investigators and other contributors.

The mid-course and final reports will be designed to be both informative and action-oriented, combining process and outcome results to date along with analysis and explication of key findings, trends, implications, and impacts. A key component of the reports will be analysis and synthesis to the extent practicable (and where information is available) that can help answer the following illustrative questions:

- Did the trans-NIH approach to the ACSI web surveys work well for participating NIH units in terms of process, quality, and performance?

- Were the ACSI survey results meaningful and helpful to most participating NIH web managers? What aspects proved more useful, the standardized and/or custom questions? Specific types of questions?
- Are the participating NIH web managers actually using the survey results to improve their on-line information dissemination efforts? What are some success stories? If not, what are the barriers?
- To what extent can the survey results be linked to actual changes in web site design and/or content?
- How well did the trans-NIH collaborative and knowledge building and sharing aspects of the project work out? Did the participating NIH web managers find value in these trans-NIH activities? If so, why? If not, why not?
- Taken as a whole, do the process and outcome results indicate an on-going need for the ACSI-type of survey methodology and some degree of trans-NIH collaboration? What are the issues and limitations?

This approach will facilitate a clear understanding of the individual and cumulative impacts of survey results on the participating web sites and related information dissemination programs. Also, it will help identify any needed changes in the survey process and questions used, as well as any generic types of needed web site improvements and any associated staff training, knowledge sharing, or NIH web policy changes that might be helpful.

Participating NIH units will be asked to contribute to the ongoing process and outcomes evaluation on which the mid-course and final reports will be based. The NIH ACSI Survey Leadership Team will set up appropriate reporting and coordinating mechanisms working with the Evaluation Consultant, Management Consultant, ForeseeResults, Inc., and Federal Consulting Group, and in consultation with the Project Advisory Committee. The latter will include representatives from each of the participating NIH units, and will meet under the auspices of the NIH Web Authors Group.

The main goals of the NIH staff workshop will be to:

- provide a trans-NIH forum to share experiences, case studies, and summative learning from the ACSI project;
- lock in and extend the trans-NIH knowledge base of web site customer satisfaction surveys;
- highlight the results of the process and outcome evaluations of the ACSI project; and
- identify and discuss lessons learned and possible future directions.

Tentatively, the staff workshop would include presentations by:

- the NIH ACSI Survey Leadership Team on the challenges of guiding and facilitating the trans-NIH process;
- select NIH web managers on illustrative ACSI case studies;

- Evaluation Consultant and ForeseeResults, Inc. on evaluation results;
- Management Consultant and Federal Consulting Group on management results;
- possible break out discussion groups on lessons learned and future options;
- break out reports to plenary session; open Q&A; closing remarks.

The workshop report would be posted on the Web Authors Group, NIH OE, NLM, and/or other appropriate web site(s) to assure trans-NIH access.

The overall NIH project will be managed by the NIH ACSI Survey Leadership Team. The NIH ACSI Survey Leadership Team will work closely with the NIH inside advisory committee, ForeseeResults Inc., and Federal Consulting Group on all phases of project implementation. The NIH ACSI Survey Leadership Team will be supported in part by the Evaluation Consultant with regard to evaluation activities and the Management Consultant with regard to project management and coordination.

On behalf of the participating NIH units, NLM will enter into an Interagency Agreement with the Federal Consulting Group, a franchise within the Department of the Treasury, to conduct the ACSI surveys (via a subcontract with ForeseeResults, Inc.). The Federal Consulting Group is the primary mechanism for Federal agencies to contract for the ACSI surveys. Because the contract mechanism is an Interagency Agreement, and because ForeSee Results, Inc. is the sole authorized vendor of the ACSI service to the Federal Government, expedited contracting procedures are in effect. Further, as noted earlier, the Federal Consulting Group has pre-approved expedited clearance from OMB for the ACSI surveys.

Purpose of this Procurement

NIH seeks an evaluation consultant to provide general web evaluation assistance and support that complements the ForeseeResults work, and to provide an important contribution to both process and outcomes evaluation of the entire project, including participation in various project meetings and preparation of mid-course and final evaluation reports. In addition, NIH seeks a management consultant to provide project management, scheduling, logistical, and related support to the project. NIH anticipates, but does not require, that these needs be served by two different persons (an evaluation expert, and a management specialist) from the contractor organization, or some combination of personnel that collectively provides the required experience and expertise.

Scope of Work

The contractor shall provide NIH with the following services:

Evaluation Support

- Task 1. Provide limited evaluation assistance as needed to individual NIH units participating in the project—this assistance will focus on general advice and guidance, both oral and written, on the use of online user surveys and specific

assistance on the development of custom questions for use in the survey instruments and on interpretation of survey results—this assistance is complementary and supplemental to the primary assistance that will be provided by ForeseeResults Inc.

- Task 2. Provide evaluation assistance to the NIH ACSI Survey Leadership Team, which serves as the management and coordination team for the overall project—this assistance will focus on general advice and guidance, both oral and written, on the use of online surveys and analysis of specific issues or questions that may arise during the course of the project—two specific issues already identified are: 1) the question of response and non-response bias, and how that bias might be minimized and better understood in the context of the ACSI survey; and 2) how to optimize online use surveys for low traffic web sites; in addition, the contractor will provide independent interpretation of select survey results, again as complementary and supplemental to the assistance that will be provided by ForeseeResults Inc.
- Task 3. Develop an evaluation plan for the trans-NIH ACSI Survey Project, including appropriate elements mentioned in this work statement.
- Task 4. Provide independent consultant reports on process and outcome evaluation of the project at or near the mid-course point, approximately eight (8) months after project start, and at or near the project conclusion, approximately fifteen (15) months after project start—the reports will address both the trans-NIH collaboration aspects of the project as well as the substantive survey results, and will cover such topics as lessons learned, comparative results, common themes, similarities and differences in custom questions, use of survey results, implications for web site improvement and future directions.
- Task 5. Attend various face-to-face meetings relevant to the project evaluation—including, tentatively, selected meetings of the NIH ACSI Survey Leadership Team; initial project kick-off meeting; selected ForeseeResults Inc. briefing meetings; NIH staff workshop; and other meetings identified by NIH. Meeting attendance will be coordinated with the management consultant (if a different person) for optimal coverage and use of resources, and to avoid unnecessary duplication of effort.

Management Support

- Task 6. Develop a management plan for the trans-NIH ACSI Survey Project, including but not limited to: key events and activities, scheduling, project management charts or equivalent, logistical requirements, data access and sharing within NIH, possible project web site, etc.
- Task 7. Provide project management support, including in particular: scheduling, logistics, note-taking and meeting minutes, e-mail management, coordination, and

related activities based on the project management plan and concurred in by the NIH ACSI Survey Leadership Team.

- **Task 8.** Attend various face-to-face meetings relevant to the project evaluation—including, tentatively, selected meetings of the NIH ACSI Survey Leadership Team; initial project kick-off meeting; selected ForeseeResults Inc. briefing meetings; NIH staff workshop; and other meetings identified by NIH. As above, meeting attendance will be coordinated with the evaluation consultant (if a different person) to assure optimal coverage and use of resources.

Period of Performance

The period of performance will begin on or about September 25, 2004, and will continue for 16 months, until January 24, 2006.

Deliverables

Evaluation Support

- **Task 1.** Contractor will convene a general group meeting with participating NIH units, to discuss general and specific issues and options including those associated with the development of custom questions for inclusion in the ACSI survey instrument. The contractor will prepare a PowerPoint presentation as well as relevant handouts for meeting participants. The meeting will be scheduled for a mutually acceptable date and location on the NIH campus (most likely within 60 days of project start). The contractor will propose an agenda for the meeting at least 15 days prior to scheduled date. The meeting is estimated to last about 3 hours. Subsequently, the contractor will serve as a resource for those NIH units requesting further assistance—to be provided in person and/or via telephone, teleconference, e-mail, and/or web site, at the mutual agreement of the contractor and NIH units under guidelines to be developed with the NIH ACSI Survey Leadership Team.
- **Task 2.** Contractor will meet an estimated 8 times over the course of the project with the NIH ACSI Survey Leadership Team, estimated at 2 hours per meeting, and prepare related materials and handouts and/or follow-up as required.
- **Task 3.** Evaluation plan—the contractor will submit an outline of the proposed project evaluation plan approximately one (1) month after project start, a draft evaluation plan approximately two (2) months after project start, and a final revised evaluation plan approximately three (3) months after project start—approximately 10 to 15 double-spaced pages in length. The plan will address the optimal meeting participation deployment of the evaluation consultant (in coordination with the management consultant).
- **Task 4.** Mid-course evaluation report—Contractor will submit an outline of the mid-course project report approximately 5 months after project start, draft report

approximately 7 months after project start, and final mid-course report approximately 8 months after project start; Final evaluation report—Contractor will submit an outline of the final report approximately 11 months after project start, draft report approximately 13 months after project start, and final report approximately 15 months after project start; Estimated report length—mid-course report 25 double-spaced pages not including appendices; final report 50 double-spaced pages not including appendices.

- **Task 5.** Contractor will tentatively participate in the following meetings (in addition to those specified in Task 2) and provide related materials and handouts and/or follow-up as required: project kick-off meeting; survey methods meeting (Task 1 deliverable) if separate from the kick-off meeting; up to six ForeseeResults briefing meetings; NIH staff workshop; and up to two other meetings to be identified. Estimated length of meetings—2-3 hours each, except for 6 hours for the NIH staff workshop. The number and type of meetings is subject to refinement as part of the evaluation plan (Task 2 above).

Management Support

- **Task 6.** Management plan---contractor will submit an outline of the proposed project management plan approximately one (1) month after project start, a draft management plan approximately two (2) months after project start, and a final revised management plan approximately three (3) months after project start—approximately 10 to 15 double-spaced pages in length.
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- **Task 7.** Management consultant will provide the specified management support services per the Task 7 SOW or as otherwise agreed to with the NIH ACSI Survey Leadership Team.
- **Task 8.** Management consultant will be expected to attend approximately the number of meetings specified in the Task 2 and Task 5 Deliverables (above) for the Evaluation Consultant, plus select meetings with participating NIH web site teams and related ForeseeResults Inc. briefings. However, the exact meeting participation plan (number and type of meetings) will be coordinated with Evaluation Consultant (if a different person) and concurred in by the NIH ACSI Survey Leadership Team, to assure optimal results.

Contract Amount and Payment Schedule

Firm Fixed Price contract not to exceed \$187,000.

The estimated allocation of costs (including travel and indirect costs) among the four tasks is:

- Task 1—\$50,000
- Task 2—\$10,000
- Task 3—\$10,000

- Task 4—\$50,000
- Task 5—\$15,000
- Task 6—\$ 7,000
- Task 7—\$30,000
- Task 8—\$15,000

Itemized reimbursable costs will be billed on a monthly, bimonthly, or quarterly basis, as preferred by the contractor. Contractor shall provide monthly financial statements showing monthly and cumulative costs incurred by task and overall, and compared to plan.

RFTOP# _____ TITLE: _____
PART II - CONTRACTOR'S REPLY: CONTRACT #263-01-D-0_____
TO # NICS-_____
Contractor: _____
Points of Contact: _____
Phone- _____ Fax- _____
Address: _____

TOTAL ESTIMATED COST:	Pricing Method
TOTAL ESTIMATED NUMBER OF HOURS:	
PROPOSED COMPLETION DATE:	

FOR THE CONTRACTOR: _____

Signature Date

SOURCE SELECTION:

WE HAVE REVIEWED ALL SUBMITTED PROPOSALS HAVE DETERMINED THIS FIRM SUBMITTED THE BEST OVERALL PROPOSAL AND THE PRICE/COST IS REASONABLE.

Billing Reference # _____

Appropriations Data:

(ATTACH OBLIGATING DOCUMENT IF AN ROC WILL NOT BE USED.)

RECOMMENDED:

FAX #	Signature - Project Officer	Date
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APPROVED: _____

FAX # _____ Signature - Contracting Officer _____ Date _____

NIH APPROVAL -

CONTRACTOR SHALL NOT EXCEED THE ESTIMATED LABOR HOURS OR ESTIMATED TASK ORDER AMOUNT WITHOUT THE WRITTEN APPROVAL OF THE CONTRACTING OFFICER & PICS COORDINATOR

APPROVED: _____
Signature –Anthony M. Revenis, J.D., NIH-PICS Coordinator Date